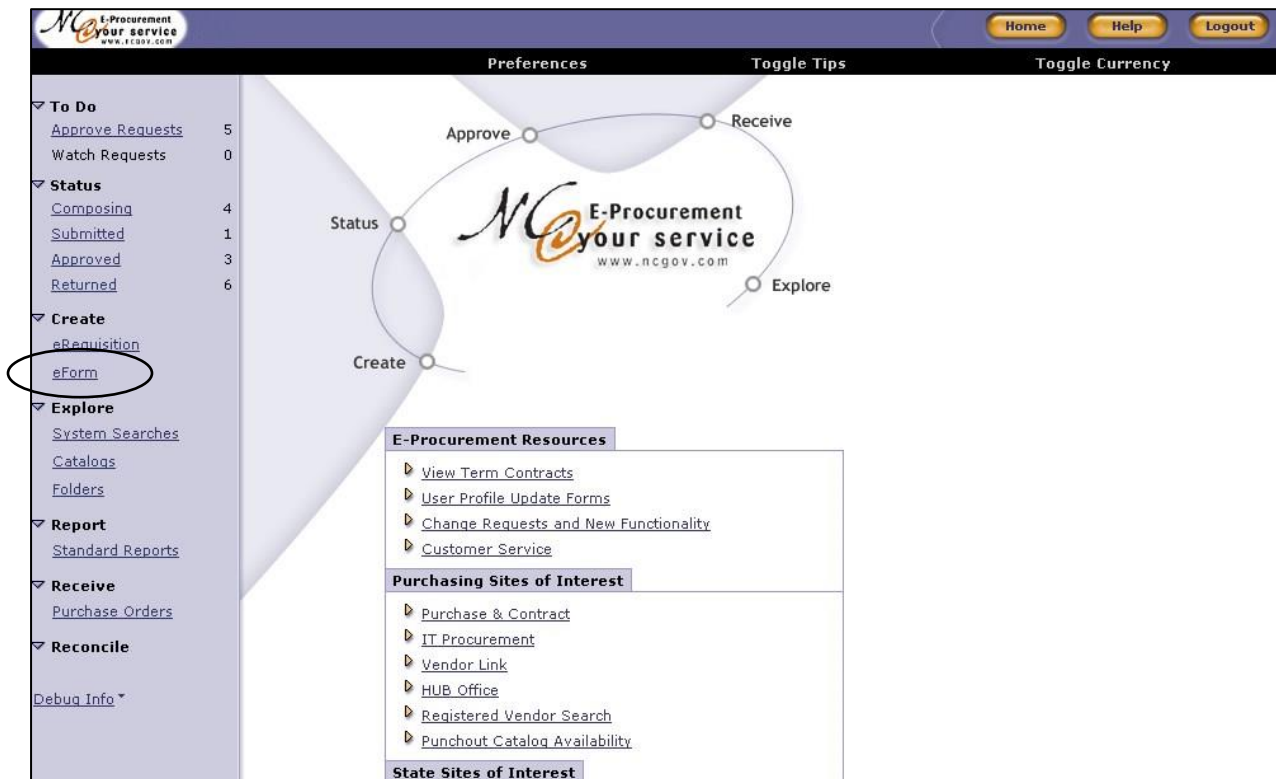


Financial Controls

Financial Controls allow NCAS agencies to restrict account code access at the user level. Financial Controls are set by using an online eForm accessible by the agency's financial controller.

1.0 Entering Financial Controls



1. Select the 'eForm' link from the Shortcut Menu.

2. Select the **'FinancialControl'** link.

Note: Depending on the user's roles within NC E-Procurement Service, other eForm links may also be available on this screen.

3. Select the appropriate user from the **'User'** dropdown box. If the user is not listed, select **'Other...'** and conduct a search for the user.

Note: If the same financial control restrictions already exist for another user, the existing user's profile can be copied. See section 2.0, 'Copying Financial Controls' for more information.

4. Click the **'Next'** button.

5. Click the 'Add' button.

6. Enter the appropriate code in each column.

Note: Users may copy and/or delete existing code restrictions by checking the checkbox beside the desired line and clicking the 'Copy' or 'Delete' button.

7. Click the 'Submit' button.

2.0 Copying Financial Controls

FC82A11: Untitled FinancialControl

1 Financial Controls - Select User FinancialControl

Select the User for whom the Financial Controls will be established. Once a user is selected, click Next to move to the next page. If you would like to copy the values from another user's profile, please select "Yes", select that user's name and then click Next.

Select User:

Entity: 42

User: CORR Request 01

Copy from another User's Profile: ☒ Yes ☐ No

Please select a user profile to copy

Copy from User: (no value)

Next > Exit

1. Choose **'Yes'** to **'Copy from another User's Profile?'**
2. Select the user from which to copy existing financial controls using the **'Copy from User:'** dropdown box. If the user's name does not appear in the list, select **'Other...'** and conduct a search for the user.
3. Click the **'Next'** button.
4. Review the information and click the **'Submit'** button.

3.0 Tips on Entering Financial Controls

1. All ranges must be entered beginning with the smaller value.
2. Once a user begins to enter values for a line, all fields must be populated before the change is accepted.
3. The maximum number of characters for each field is as follows:
 - Company – 4 digits
 - Account – 11 digits
 - Center – 12 digits
 - Project Company – 11 digits
 - Project Code – 11 digits
4. Numeric values are processed before alpha values. For example, an all-inclusive range for an account would be 5300000000 to 53ZZZZZZZZ.
5. If the agency does not use Project Company and Project Codes, or if no restrictions should be placed on these values, these fields should be left blank.
6. To prevent a user from adding a project company or project code to a transaction, type **“Unspecified”** in both the **‘From’** and **‘To’** boxes for that field.